Create Resource Profiles

This job aid describes how to create a profile record for a resource. There are three basic types of resource profiles; a full profile, a quick profile, and a cloned profile. This job aid includes instructions for all three. How to manage resource records is covered in the “Manage Resource Records” Supplier Job Aid.

BEFORE YOU CREATE A NEW PROFILE RECORD, you should search your Resource Pool to ensure that a record does not already exist. Remember to set the search filter to include both active and inactive resource records. If you discover your resource has an existing record, but it is only a “Quick Resource” profile, use the instructions below to upgrade the Quick version to a full profile.

The importance of consistent data entry when creating resource profiles cannot be overstated. Develop standard policies and enforce them! Avoid duplicate profiles since they can negatively affect downstream activity such as tenure tracking and budget-related reporting.

If you copy/paste name entries from a third party source, take care that the original does not include letters with diacritics. The system will accept the “copy” as entered and although the subsequent resource record can be selected/submitted, any name search will never generate a match/hit since a standard English keyboard does not include diacritic letters and search results must be an EXACT match.

To create a full resource profile:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
2. Hover over the **Resources** tab in the Header Menu bar and click **Create Resource**. The Create **Resource** record opens at the General tab.

   A full resource profile record has multiple tabs. Data entry requirements and functionality vary from tab to tab. Data entered on one tab can impact data requirements on other tabs so watch for prompts and advisory content as you work through these tabs. Use the tab headers or the embedded <next> / <back> buttons to move from one tab to another. DO NOT USE THE BACK ARROW ON YOUR BROWSER WINDOW!

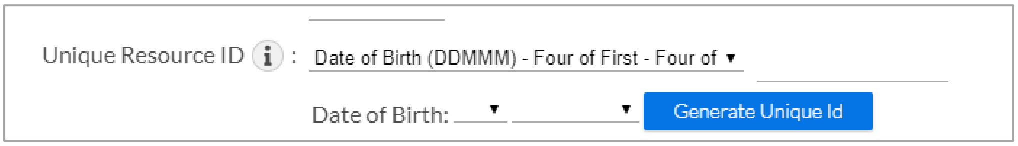
3. Follow the instructions provided below to complete each individual tab.

   Be aware *that once you click Create Resource, the system’s active-session timer starts its countdown. You need to click ‘save changes’ on the Summary tab BEFORE your session expires or you will lose ALL the data you have entered on ALL the tabs of the resource profile.* ***The maximum duration of an active session is 15 minutes.*** *Until you become familiar with the format of these profiles, you may want to complete all the required fields (as indicated by the* ***red asterisk *)*** *on the General tab then skip directly to the Summary tab and click ‘save changes’. Your record is saved and the session timer is reset. You can then go back to complete each tab you skipped in <edit> mode. The 15-minute session limit applies even in <edit> mode so it is advisable to use the ‘save changes’ option frequently rather than risk losing your entries.*

General tab:

- Complete all required fields on this tab as indicated by the **red asterisk (*)**. Typically, the standard required fields include the resource's First Name, Last Name, Email, Unique Resource ID, and the Managing Supplier Agents. Other fields may be designated as required depending on Shell requirements.
- To create the Unique Resource ID, select the Date of Birth (Day and Month)—then click the **generate unique id** button (

). The system populates the ID based on the data entered in the Contact Information fields.



If "match alerts" is enabled, the supplier has visibility to the resource's previous assignments. Buyers can view duplicate submittals, contractor time limits, prior evaluations, etc., during the candidate review process.

- To select the Managing Supplier Agent(s), review the list of names shown in the "Available Supplier Agents" selection box, then use the selection arrows to highlight the Supplier Agent(s) needed for this resource's profile. Your selection(s) transfer to the "Managing Supplier Agents" list when you click the select button in the middle.

- Complete other data fields as needed or required.
- Use the "Duplicate Search" feature to ensure that you do not create a duplicate profile for a resource that is already in your Resource Pool.
- Click the **Desired Job** tab or the **next** button (

) located in the lower-right corner of the screen to move to the next tab.

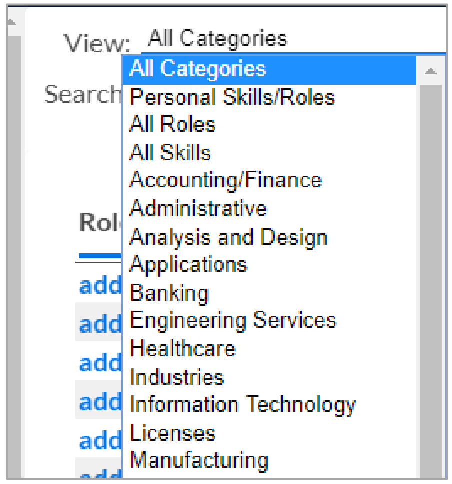
Desired Job tab:

- Review the advisory content located at the top. Note that although no fields are marked by a red asterisk (*), both Job Type and Location Preference(s) are required.
- Select **Contract** for Job Type. This is the only current valid option for Shell.
- Select whether the candidate wants a part-time or full-time position.
- Enter when the resource is available for an interview, their earliest start date, names of any references, and the length of notice the resource prefers.
- Use the Available Locations selection list to pick the geographic locations the resource prefers.
- Specify if relocation assistance is needed.
- Click the **Skills/Role** header tab or the **next** button (

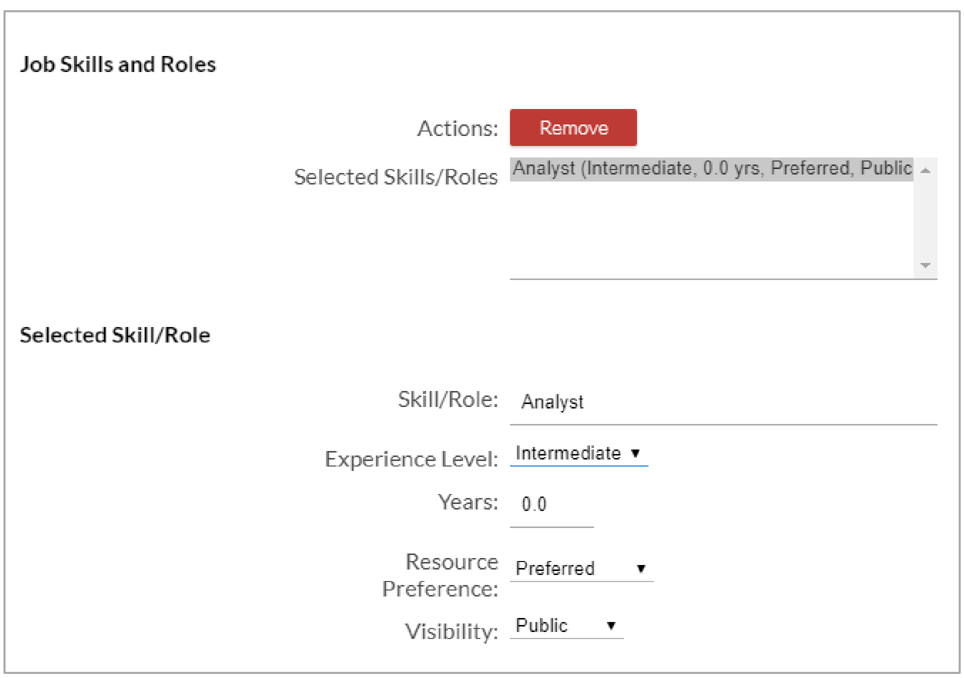
) located in the lower-right corner of the screen to move to the next tab.

Skills/Roles tab:

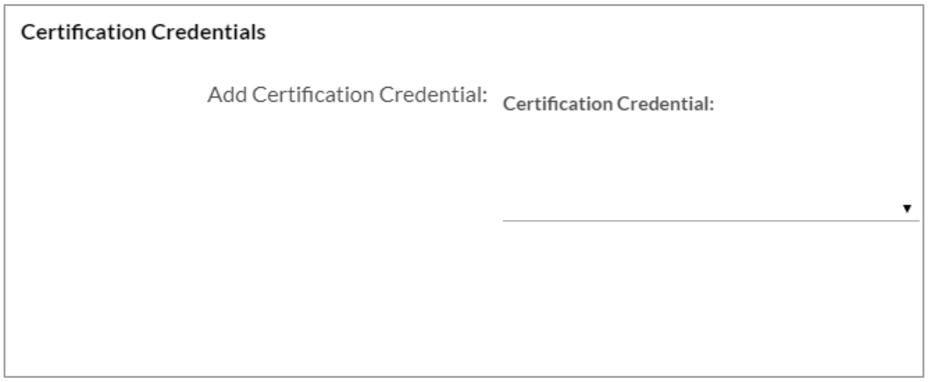
- **Think before you click!** The column on the right is a list of **all possible** Skills and Roles. To select the skills and roles that you want to include in the resource's profile, click add (add) next to the item in the Skills/Roles list.



- Click the down arrow in the **View** field to reveal the selection list. Pick a category and then scroll through the list to make your selections. The system posts your selection into the **Job Skills and Roles** section on the left—and it also populates related sub-fields into the **Selected Skill Role** section. Be sure to adjust the settings in the sub-fields to indicate the resource's level and years of experience. Set Visibility to public or internal. Use public if you want to allow the hiring manager to see the selected skills/roles.



- Use the down arrow in the Certification Credentials section to reveal the selection list.



- Complete the adjacent sub-fields once you make a selection. Click **save** in the Action column when you are done. NOTE: This 'save' action only saves the Certification Credential entry, IT DOES NOT SAVE THE RESOURCE PROFILE!

- Click the **Education** header tab or the **next** button (Next) located in the lower-right corner of the screen to move to the next tab.

Education tab:

- Review the advisory content located at the top. Note that although no fields are marked by a red asterisk (*), at least one educational discipline and level are required. Select 'Not Applicable' from the Disciplines column on the right if no educational discipline/level applies.
- Note that the Disciplines column on the right is your pick list (i.e., add) for the Resource Educational Disciplines section on the left. Unlike the Skills/Roles pick list, this one is a single scrollable list with no search filters or options.
- Click **add** for each discipline you want to include in the resource's profile.
- Update any sub-fields that auto-populate into the Selected Education Discipline section.
- Click the **Attachments** header tab or the **next** button (Next) located in the lower-right corner of the screen to move to the next tab.

Attachments tab:

- Review the advisory content at the top of this tab! It states what type of material may be attached as well as any format and/or file size restrictions. Use this tab if you plan to attach a resume.
- Click **Choose File** to browse and locate the file you want to import.

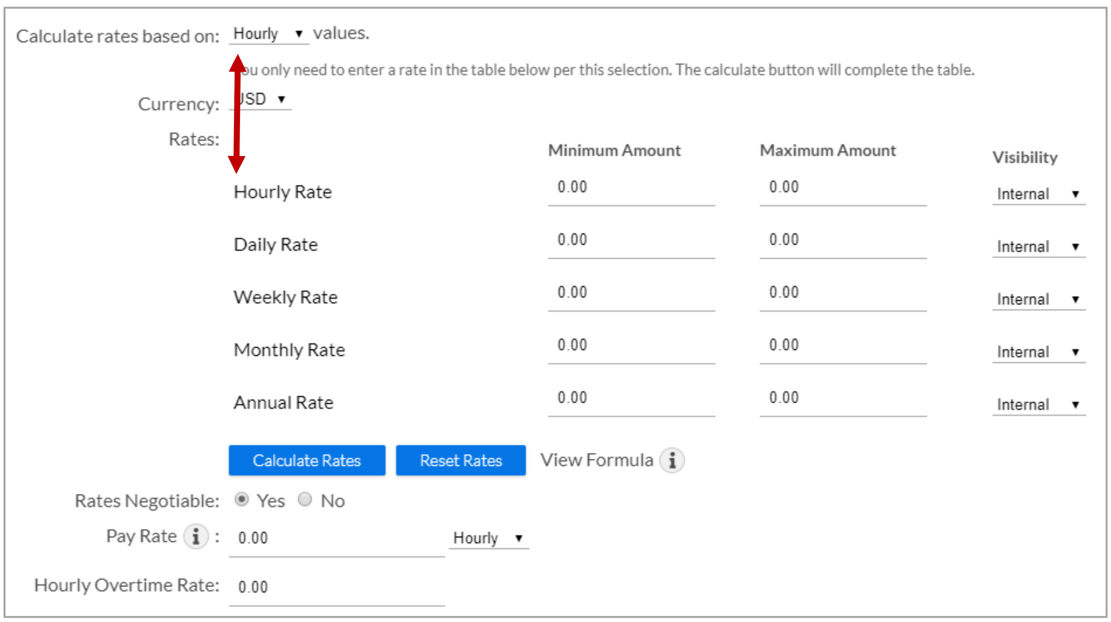
- Click **attach** (Attach) to import the file. The filename displays in the Document list for each successful import.
- *Optional*. Use the Misc. Text box to add any supplemental text.
- Click the **Bill Rate / Salary** header tab or the **next** button (Next) located in the lower-right corner of the screen to move to the next tab.

Bill Rate / Salary tab:

- On the Bill Rate/Salary tab, select values for the **Calculated Rates Based on** and **Currency** fields using the pull-down selection lists.

  The Bill Rate Criteria section is required when Job Type is set to 'Contract' (see Job Type on the Desired Job tab.) NOTE: Bill Rate is the contractor's pay rate plus the markup.

- Find the row in the **Rates** section that matches the value you selected for the **Calculate rates based on** field.



- Enter both the **Minimum** and **Maximum** values on just that row.
- Click **calculate rates** (Calculate Rates) and the system will auto-calculate ALL the other rate fields.
- Complete the other data fields (e.g., Rates Negotiable, Pay Rate, Hourly Overtime Rate, Hourly Overtime Rate Negotiable, and Bill Rates Comment) as needed. These are not required fields and the rate fields do not auto-calculate.
- Click the **Other** header tab or the **next** button (Next) located in the lower-right corner of the screen to move to the next tab.

Other tab:

- Use the radio buttons to adjust your preferences for the listed items. Note that some items have data fields to indicate percentage, date, or allow for comments.

Although no fields are required on this tab, all Items listed are Shell specific.

- Click the **Summary** header tab or the **next** button (Next) located in the lower-right corner of the screen to move to the next tab.

Summary tab:

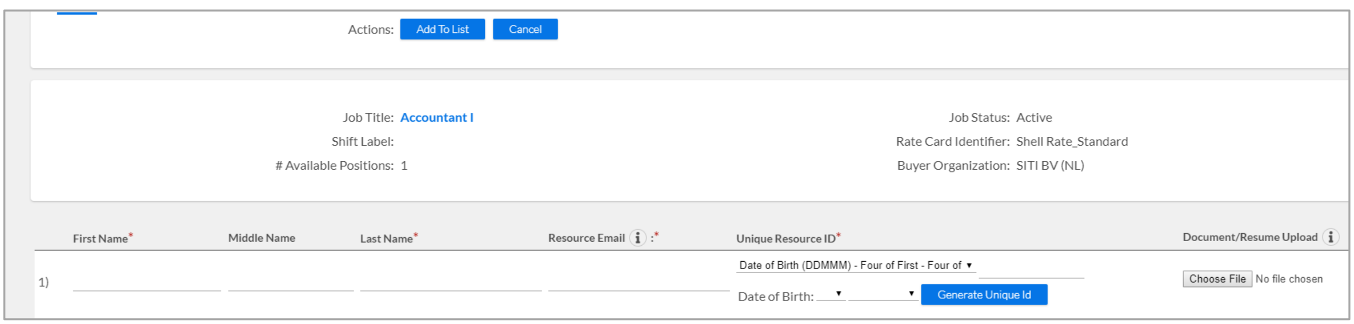
- Review the profile as summarized on this tab. To make adjustments you need to click back to the respective tab.
- Click **save changes** (Save Changes) when your review is complete. Validation Messages display at the top of the Summary tab if any data fields fail to validate.
- Make adjustments as indicated, then return to the Summary tab and click **save changes** again. Repeat until the system indicates your save is successful.
- Click **activate** (Activate) to upgrade your resource to active status.

  A resource can only be auto-matched to available job opportunities when the resource profile is set to 'active'.

To create a Quick Resource profile:

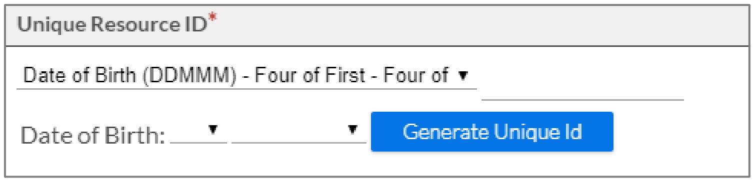
A Quick Resource profile is an option when submitting candidates to a job opportunity and the candidate you want to submit does not have a resource profile in your Resource Pool. See the "Submit Candidate to a Job Opportunity" Supplier Job Aid for details. For your convenience, the process steps from that job aid are provided below.

- Click **create new resource** in the Build Resource List section. The Quick Resource list screen appears.



- Complete the required fields as indicated by the red asterisk (*). These include first name, last name, email, and Unique Resource ID.

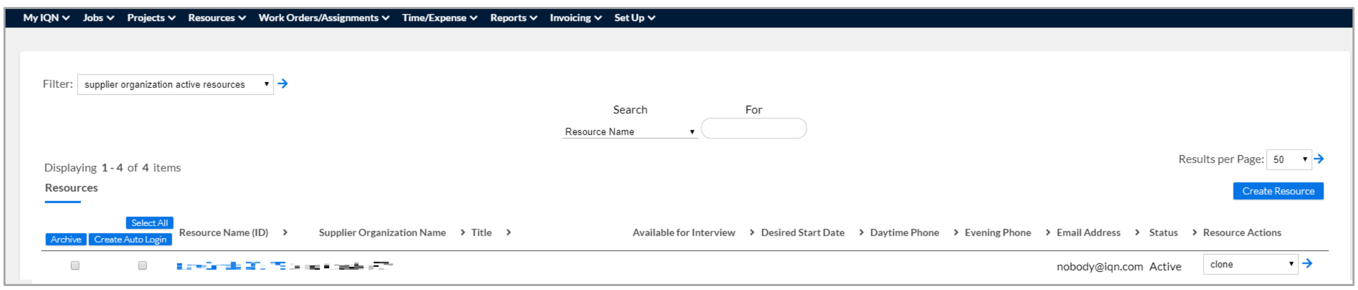
  ⚠ A Resource/Contractor can only use the Self-Directed Password Reset option if the email on their Resource Profile record is a valid email and one to which the Resource has access.
- After you enter the First Name, Last Name and then select the Date of Birth (Day and Month), click **generate unique id** and the system auto-generates the Unique Resource ID.



- Click **Browse…** to attach the resource's resume or other support documentation in the Document/Resume Upload column. File size cannot exceed 1 MB.
- Repeat this process to create each new resource for your Resource List as needed.
- Click **add to list (** add to list **)** at the top of the screen to close this screen and return to the job opportunity record. Each new resource now displays in the Resource List section of the job opportunity record as a separate line item.

To clone a resource profile:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Hover over the **Resources** tab in the Header Menu bar and click **Resources**. The **Resources** list screen appears.



NOTE: The default display is ACTIVE resources, in alphabetical order by last name. A count of total records along with a count of viewable records displays above the title bar.

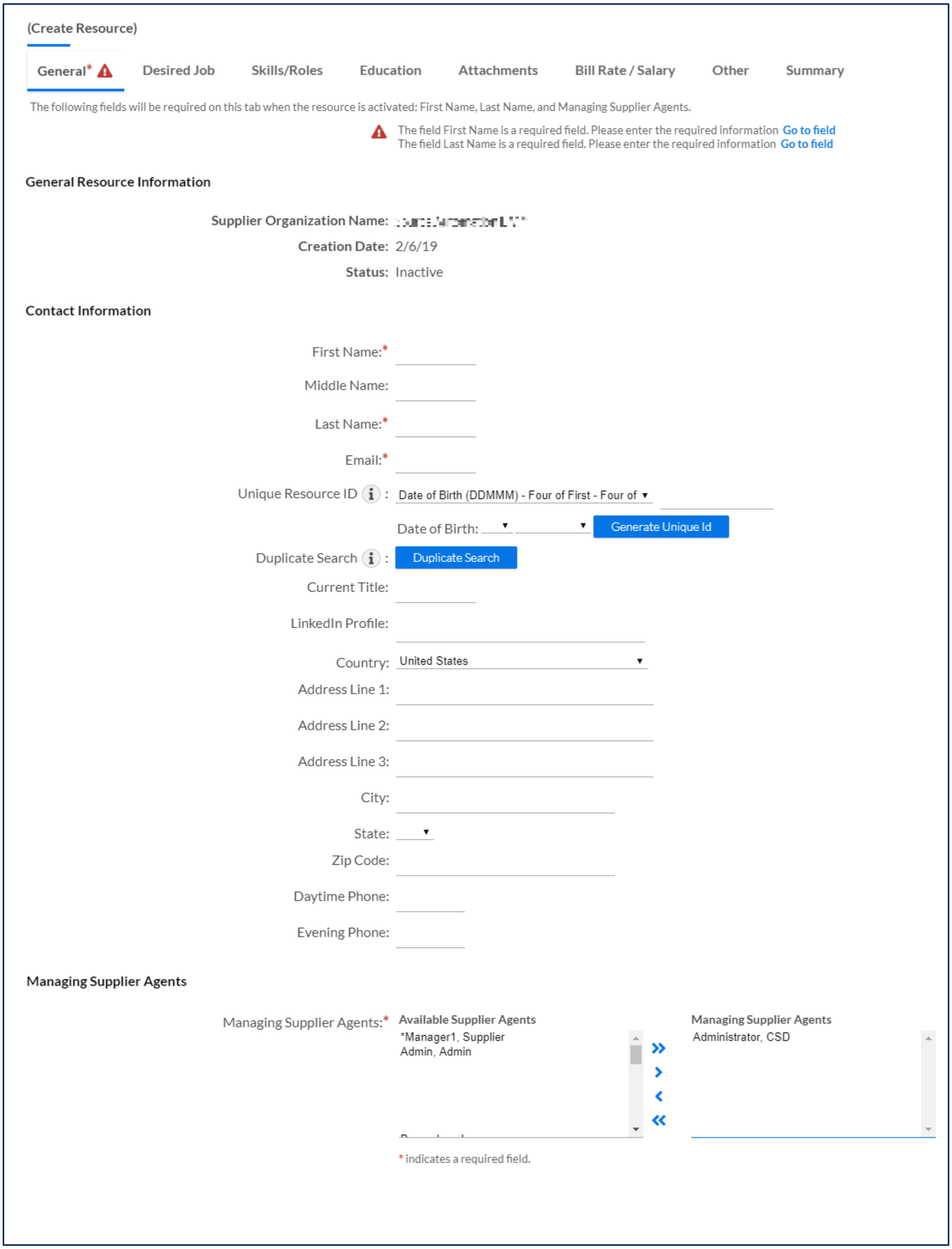
This list of resources is specific to YOUR user role. You will need to change the search filter to view ALL resource records.

> • *Use the Results per Page pull-down selection option on the right-hand side of the screen to adjust how many records display per screen.*
> • *Click any column header to change the sort order of the list based on that column. Click the column header a second time to sort in reverse order.*
> • *Use the Filter selection list in the upper left-hand section of your screen to limit your resource list by status. Click the GO arrow to activate your selection.*
> • *Use the Search selection list in the upper middle of your screen to locate resources by category. Enter a value in the **For** field that matches your search selection category and then press <**Enter**> to perform the search.*

3. Locate the resource record you need in the **Resource Name (ID)** column.
4. Use the down arrow to select **clone** in the Resource Actions column and click the GO arrow to go to the **Create Resource** screen.

> *Use this method when you need to submit multiple resources with similar skill sets (e.g., industrial labor categories, headcount-tracking assignments). Active or full-profile resource records are the best "source" for cloning since almost all the data fields in a Quick*

Resource record (e.g., First Name, Last Name, Email, and Unique Resource ID) as well as attachments are excluded from the cloning process.



(Create Resource)

General* | Desired Job | Skills/Roles | Education | Attachments | Bill Rate / Salary | Other | Summary

The following fields will be required on this tab when the resource is activated: First Name, Last Name, and Managing Supplier Agents.

The field First Name is a required field. Please enter the required information Go to field
The field Last Name is a required field. Please enter the required information Go to field

General Resource Information

Supplier Organization Name: [illegible]
Creation Date: 2/6/19
Status: Inactive

Contact Information

First Name:*
Middle Name:
Last Name:*
Email:*
Unique Resource ID : Date of Birth (DDMMM) - Four of First - Four of
Date of Birth: Generate Unique Id
Duplicate Search : Duplicate Search
Current Title:
LinkedIn Profile:
Country: United States
Address Line 1:
Address Line 2:
Address Line 3:
City:
State:
Zip Code:
Daytime Phone:
Evening Phone:

Managing Supplier Agents

Managing Supplier Agents:*
Available Supplier Agents: *Manager1, Supplier; Admin, Admin
Managing Supplier Agents: Administrator, CSD

* indicates a required field.

5. Update all required fields (as indicated by the red asterisk) to match your new resource. This includes adjusting the selection lists in the Managing Supplier Agents section.
6. Click through the additional tabs (Desired Job, Skills/Roles, Education, Bill Rate/Salary, Other) and make adjustments to the 'cloned' content as needed. Use the instructions in the "To create a full resource profile" section above.
7. Click the **save changes** (Save Changes) on the Summary tab when your adjustments are complete.
8. *Optional*: Make any corrections as indicated by any Validation Messages. Return to the Summary tab and click **save changes** again. Repeat until the system indicates your save is successful.
9. Click **activate** (Activate) to upgrade this new resource profile to active status.

A resource can be submitted as a candidate even if their status is 'inactive', but only resources with an 'active' status qualify for the Candidate Matching feature.